

SYSTEM AND METHOD FOR REMOTE COLLECTION OF DATA

Abstract

A system and method for managing electronic forms data, and financial advise applications is provided. Financial advisors may be equipped with portable computing devices, such as a laptop or tablet PC to provide customers in-field support through the use of financial advise applications, customer data and electronic forms. Further, the invention provides a means for applications, data and forms to be synchronized with the various computing systems of a financial services company's computing center. Such synchronization enables in-field financial advisors to work remotely yet have most of the tools and functionality provided for by the systems of the computing center.